Strategies For Trusts And Estates In Florida Leading Lawyers On Monitoring Current Trends Preventing Litigation And Determining The Best Estate Planning Strategy Inside The Minds

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Your Florida Wills, Trusts, & Estates Explained Simply - Linda C. Ashar 2010-11-15
Few people want to think about what would happen to their family if they become disabled or die; however, planning for these occurrences in advance will reduce potential stress on your family later in life. This new book will take the guesswork out of planning your estate and help you finally understand the complex processes. The right plan can protect the value of your estate and spare your loved ones unnecessary hassles and legal conflicts. Your Florida Wills, Trusts, & Estates will help you glide through this complicated process. This new book has been adapted to offer Florida residents state-specific advice for estate planning. Author Linda C. Ashar, Attorneys at Law, has crafted an estate planning primer, allowing Florida residents to become more informed and more involved during the process. Your Florida Wills, Trusts, & Estates will provide all the information you need to choose, set up, and execute a will, trust, or estate. You will learn the legal terminology, including beneficiary, probate, trustor, trustee, assets, guardianship, and executor. You will also learn about trust agreements, trust property, settlement costs, life insurance, durable power of attorney, marital deductions, gift splitting, survivorship deeds, gift tax issues, generation skipping transfer tax, tax deferred accounts, and advance directives. Florida -specific information is offered throughout this book, including: Florida probate code; Florida rules, regulations, and laws specific to estate planning; elements of a valid Florida will; planning your living will in Florida; explanations of

Florida laws regarding durable health care power of attorneys, do not resuscitate (DNR) orders, and directives to withhold CPR. The book's easy-to-understand context clarifies this complicated and sensitive subject and gives readers the power to take control of their future. Whether you are writing your will, establishing a trust, planning your estate for the first time, or updating and revising your previous plans, Your Florida Wills, Trusts, & Estates will give you all the tools and knowledge you need to decide where and to whom your assets will go when you die. Other books offer a non-state-specific overview of estate planning, causing many readers to be misinformed about rules and regulations particular to their state; but, this new book provides information Florida residents need to know. Do not get outdated or wrong information that does not pertain to you specifically. Use this new book to craft an estate plan that is not only legally sound but also fully carries out your last wishes and protects your loved ones.

Comprehensive Financial Planning Strategies for Doctors and Advisors - David Edward Marcinko 2014-12-09

Drawing on the expertise of multi-degreed doctors, and multi-certified financial advisors, Comprehensive Financial Planning Strategies for Doctors and Advisors: Best Practices from Leading Consultants and Certified Medical PlannersTM will shape the industry landscape for the next generation as the current ecosystem strives to keep pace. Traditional generic products and sales-driven advice will yield to a new breed of deeply informed financial advisor or Certified Medical PlannerTM. The profession is set to be transformed by "cognitive-disruptors" that will significantly impact the $2.8 trillion healthcare marketplace for those financial consultants serving this challenging sector. There will be winners and losers. The text, which contains 24 chapters and champions healthcare providers while informing financial advisors, is divided into four sections compete with glossary of terms, CMPTM curriculum content, and related information sources. For ALL medical providers and financial industry practitioners For NEW medical providers and financial industry practitioners For MID-CAREER medical providers and financial industry practitioners For MATURE medical providers and financial industry practitioners Using an engaging style, the book is filled with authoritative guidance and healthcare-centered discussions, providing the tools and techniques to create a personalized financial plan using professional advice. Comprehensive coverage includes topics likes behavioral finance, modern portfolio theory, the capital asset pricing model, and arbitrage pricing theory; as well as insider insights on commercial real estate; high frequency trading platforms and robo-advisors; the Patriot and Sarbanes–Oxley Acts; hospital endowment fund management, ethical wills, giving, and legacy planning; and divorce and other special situations. The result is a codified "must-have" book, for all health industry participants, and those seeking advice from the growing cadre of financial consultants and Certified Medical PlannersTM who seek to "do well by doing good," dispensing granular physician-centric financial advice: Omnia pro medicus-clientis. RAISING THE BAR The informed voice of a new generation of fiduciary advisors for healthcare

Living Trusts for Everyone - Ronald Farrington Sharp 2017-03-21

This guide explains the benefits of a living trust in simple, specific terms and shows how to set up a loved one's trust with no lawyers and no expense. Wills benefit lawyers. Trusts benefit the clients. Too often lawyers sell wills to clients only to sit back and wait to sell their probate services to their clients' heirs. Ronald Farrington Sharp describes the best way to handle modern estate planning and details the many advantages trusts have over wills in not only eliminating probate but in also protecting your assets for your heirs. Sharp explains why legal services are not needed to do the clerical work in settling a trust after death. This updated edition includes new information on an array of subjects, including: Elimination of the federal estate tax for most estates due to increased exemption amounts Online assets The use of passwords, usernames, and websites Keeping trustees honest and the process of removing trustees for malfeasance Forms for simplifying the planning process Strategies to lower attorneys' fees With no legal jargon, just step-by-step instructions and sample form letters, Living Trusts for Everyone takes the mystery out of the process of setting up a trust.

“Sharp makes a reasoned and strong case for the use of trusts as a complete alternative for wills. For roughly the cost of a lunch, Living Trusts for Everyone can . . . equip the average American with enough thoughtful questions to ensure that his or her lawyer is doing all that s/he can to protect that person’s assets. For that alone, it belongs on your reading list.” —New York Journal of Books “If you want to know a good deal about estate planning and trusts but don’t want a four-hundred-page boring book to read, I highly, highly recommend getting this one. It’s short, to-the-point, and very informative.” —FreeMoneyFinance.com “Ronald Sharp explains trusts in clear and easy-to-understand language, including one truth most lawyers don’t want to admit: a trust is often better than a will and less costly!” —Lonnie Mclane, Estate & Tax Consultants, LLC

Basic Estate Planning In Florida 11th Edition - LexisNexis Editorial Staff 2022-10-14

This popular manual covers all facets of basic estate planning. Tax and accounting issues, ethical issues, and problems related to specific forms of ownership and special classes of persons are examined. Homestead considerations and handling of assets acquired in community property jurisdictions are also featured.

Suze Orman's Protection Portfolio - Suze Orman 2002

Suze Orman's Financial Package is a systematic approach for organising your essential documents. The Financial Package is very different from any other product of this type, because Suze has included three CDs that actually include the forms and instructions to create your own advanced directive with durable power of attorney for health care, financial power of attorney, will, and a trust.

Florida Landlords Rights and Strategies - Mark Warda 2011-04-01

In this successor volume to the 10 previous editions of his 1983-2005 book Landlords' Rights & Duties in Florida, attorney/investor Mark Warda adds practical advice on successful landlording, including asset protection techniques, tax tips and other tricks he has learned “in the trenches” as a landlord and attorney.For almost 30 years Florida landlords called his first book their bible for being a landlord, but since the publisher stopped issuing updates he put together a new book, completely up to date with new chapters on practical matters that landlords deal with.It includes all Florida Statutes relating to landlord tenant matter, Florida court cases, flow charts, and 66 ready-to-use forms based on the author's 37 years experience and research! It covers every aspect of being a landlord, including: •Finding the right property •Making a plan for success •Finding the right tenants •Protecting your assets •Knowing the rules •Ending a tenancy •Evicting a tenant •After a tenancy •Tax rules & loopholes ... and more This book includes 67 useful forms, including: •Tenant application •Lease addendums •Approved eviction forms •Tenant credit check approval •Amendment forms •Advanced motion forms •Leases and rental agreement •Required notices •Court stipulation •Numerous management forms •Bad check form •Final Judgments In these days of over-regulation and share-the-wealth policies, it's important for landlords to know their legal rights and this book provides what they need to know.

The Florida Domicile Handbook - Michael Kilbourn, E. 2009-01-15

The Florida Domicile Handbook provides insights into the significant advantages, and especially the financial advantages, of domiciling in Florida. During the current housing crisis, homeowners are alarmed to see the increases in interest rates and realty taxes raising their mortgage payments beyond their reach. Though some reductions in payments can be achieved by searching for special financing, opportunities for significant savings in this area are limited by prevailing money market conditions. More promising are the savings in reality taxes that are possible by changing domicile. Florida has recently enacted legislation through its Homestead Act that limits substantially the annual increases in realty tax. Florida is also one of the few states that has no income tax. These two incentives alone have been a major factor in creating the stream of new residents who have chosen to declare Florida as their principal residence. As the Baby Boomers retire, it is anticipated that this stream will grow into a flood. Anticipating this trend, the authors have written the most comprehensive book on the subject of Florida domiciling. It addresses a variety of topics including: • Advantages of

Florida domiciling • Detailed steps to follow in achieving a Florida domicile • When, where and how to buy a home • Advice on how to find a good Realtor and lender • Legal perspectives into laws affecting new residents • How to register and insure cars and boats • List of resources and web sites for staying healthy, including state programs, medical initiatives and healthcare coverage options.• Estate planning advice

Risk Management, Liability Insurance, and Asset Protection Strategies for Doctors and Advisors - David Edward Marcinko 2015-12-22

It is not uncommon for practicing physicians to have more than a dozen separate insurance policies to protect their medical practice and personal assets. Yet, most doctors understand very little about their policies.Risk Management, Liability Insurance, and Asset Protection Strategies for Doctors and Advisors: Best Practices from Leading Consultant

Smart Guide to Estate Planning - Laura Spinale 1999-08-18

An all-you-need-to-know introduction to ensuring that your wealth and wishes are protected and preserved for family and loved ones Smart Ways to determine what you are worth with a smart and easy step-by-step process Smart Advice on life insurance, power of attorney for health care and finances, long-term care insurance, and appointing a personal guardian for your children Smart Strategies on avoiding probate and how trusts can help you and your loved ones avoid costly legal fees and devastating estate taxes Smart Tips on what you should know when creating a will, deciding on a living will, and taking a hand in planning your funeral Quick reading and easy referencing with a comprehensive index and loads of sidebars and tables Smart Guides take readers seriously. They satisfy even the most curious person's desire to know the essentials about any of a wide range of topics—from vitamins to mutual funds to stress relief. It's all about good reading and expert information. The choice is yours.

Asset Protection Strategies & Forms - Dustin I. Nichols 2018-03-30

A complete planning toolbox with: a full range of domestic and international structures, from simple spendthrift clauses through equity strips to collapsing bridges.

Understanding Living Trusts - Vickie Schumacher 1990

Written in clear, conversational English, this book can help anyone understand how a living trust avoids the complications, expenses, and delays of probate at times of incapacity and death.

<u>Administration of Trusts in Florida</u> - The Florida Bar Continuing Legal Education 2017-06-09

The revised and expanded Ninth Edition of this perennial bestseller addresses in-depth the Florida Trust Code and subsequent amendments to the Code passed by the Legislature through 2013. In addition, this new edition features extensive treatment of all facets of trust administration. Highlights of the new Ninth Edition include: • Updated income tax rates applicable to trusts • Discussions of the American Taxpayer Relief Act of 2012 (ATRA), Florida state health exchange, and F.S. 736.0202, the long arm statute that became effective 10/1/13 • Updated statutes and case law • Chapters devoted to the Prudent Investor Act and Special Needs Trusts Tax considerations are stressed throughout the text, and are treated in depth in Chapter 12 of the manual. With the explosive increase in the use of trusts by Florida residents, this updated manual addresses a myriad of issues that attorneys practicing in this area are likely to confront on a daily basis.

Living Trusts for Everyone - Ronald Farrington Sharp 2017-03-21

Readers say it best: "Very informative." "Saved me a lot of money and headaches!" "Recommend it for everyone who has to plan estates for their elderly parents" Living Trusts for Everyone is the best resource for setting up a living trust. Explaining in specific terms what benefits a trust will have, Ronald Farrington Sharp gives the tools necessary to set up a loved one’s trust with no lawyers and no expense. Wills benefit lawyers. Trusts benefit the clients. Too often lawyers sell wills to clients only to sit back and wait to sell their probate services to their clients’ heirs. Ronald Farrington Sharp describes the best way to handle modern estate planning and details the many advantages trusts have over wills in not only eliminating probate but in also protecting your assets for your heirs. Sharp explains why legal services are not needed to do the clerical work in settling a trust after death. This updated edition includes new information on an array of subjects, including: Elimination of the federal estate tax for most estates due to increased exemption amounts Online assets The use of passwords, usernames, and websites Keeping trustees honest and the process of removing trustees for malfeasance Forms for simplifying the planning process Strategies to lower attorneys' fees With no legal jargon, just step-by-step instructions and sample form letters, Living Trusts for Everyone takes the mystery out of the process of setting up a trust.

Administration of Trusts in Florida - Florida Bar Continuing Legal Education 2019-09-20

The revised and expanded Tenth Edition of this perennial bestseller addresses in-depth the Florida Trust Code and subsequent amendments to the Code passed by the Legislature through 2017. In addition, this new edition features extensive treatment of all facets of trust administration. Highlights of the new Tenth Edition include: Coverage of the 2017 Tax Cuts and Jobs Act New and expanded overview of trust administration New sections on Decanting, Social Investments, Self-Settled Spendthrift Trusts Outside Florida, Ethical Issues in Preparation of Deeds, Marital Agreements and Title, Drafting Third-Party Special Needs Trusts, and on Offshore Trusts, including Determination of Beneficiaries, Taking Inventory of Trust Assets, Life and Annuity Policies Rewrites of sections on Who May Serve as Trustee, Trustee's Power to Invade Principal, and Multiple Trust Rule with 2019 legislation Updates on the Florida Trust Code, fiduciary attorney-client privilege, safe harbor and homestead rights, Florida Medicaid Programs, Deductions for Qualified Business Income, Alimony Special Needs Trusts with respect to 2018 POMS Revisions, and Distributions and SSI Income Rules Elaboration on Statutes of Limitations Regarding Trust Disclosure Documents, Trust Modification and Trust Termination, the Sole Benefit Rule for Special Needs Trusts, and the Choice of Trustee for d4A Trusts Updates and discussions about rules, statutes, and recent case law Tax considerations are stressed throughout the text, and are treated in depth in Chapter 12 of the manual. With the explosive increase in the use of trusts by Florida residents, this updated manual addresses a myriad of issues that attorneys practicing in this area are likely to confront on a daily basis.

Guide to Estate Planning - 2007-01-01

Covers all the fundamental areas of estate planning and incorporates relevant legislative changes. Provides checklists, tables, tips, case studies and examples. Latest issues and topics relating to financial and estate planning, superannuation and tax implications, effects on social security and benefits of business succession planning.

Florida Will and Trust Forms Manual - Walter S. Kane 2000

Asset Protection in Florida - Florida Bar Continuing Legal Education 2020-02-07

Asset Protection in Florida covers all facets of asset preservation for Florida residents. The manual provides comprehensive analysis of the many steps available to protect assets from creditors' claims, both during your lifetime and at death. Among the many topics covered are homestead, trusts (both domestic and offshore), business planning, planning for dissolution of marriage, protection of retirement and education accounts, and the ethical aspects of advising clients on asset protection issues. Bankruptcy issues and tax planning are prominently featured throughout the text. Highlights of the Sixth Edition include: Updated case law, statutes, rules, regulations, etc. Hot Topics: Asset protection provided with Florida corporations and the 2019 Florida Legislature's substantial amendments to F.S. Chapter 607, effective January 1, 2020. Full and complete exemption from ad valorem taxes as to the homestead real property for totally and permanently disabled first responders under F.S. 196.102. Damage to homestead due to misfortune or calamity, including homesteads significantly damaged or destroyed as a result of a named tropical storm or hurricane under new F.S. 193.155(8)(m). Tax Cuts and Jobs Act of 2017 and financial disclosure of deceased spousal unused exclusion amount and lifetime taxable gifts. Tax Cuts and Jobs Act of 2017 and the income tax effect of alimony. Discussion of newly enacted "safe harbor" statute, F.S. 732.7025, for the waiver of spousal homestead rights through a deed.

Florida Probate Rules and Statutes, Rules of Civil Procedure, and Rules of Judicial Administration 2022 Edition - LexisNexis Editorial Staff 2022-02-04

This latest edition of Florida Probate Rules and Statutes, Rules of Civil Procedure, and Rules of Judicial Administration, is a handy go-to reference that every wills and estates practitioner should keep close at hand. It features the full text of the Florida Probate Rules, Rules of Civil Procedure, and the Rules of Judicial Administration, including 3-year cycle amendments, with the committee notes, rule histories, and statutory and rule references for each rule. It also includes critical blackletter law from the Florida Statutes and Constitution, including Title XLII, Estates and Trusts, and Chapter 198, Estate Taxes in their entirety, as well as Homestead and exemptions, critical statutes on investment by fiduciaries and financial institutions, the most relevant statutes on developmental disabilities and social and economic assistance, expertly selected statutes from Title XL, Real and Personal Property, and various civil procedure statutes. Don't be without Florida Probate Rules and Statutes, Rules of Civil Procedure, and Rules of Judicial Administration, , the convenient and critical reference you need every day for your wills and estates practice. Published by The Florida Bar and LexisNexis, it contains the high quality and expertise you have come to rely on and is fully up-to-date with the latest rules amendments and legislative changes.

The Florida Residency and Estate Planning Guide - Craig R. Hersch 2016-08-10

Whether to claim Florida residency and how that affects your estate plan are two significant questions on many people's minds. This book addresses whether your will, revocable living trust, durable power of attorney, health care surrogate and living will documents from up north remain valid, the important issues you should consider when updating your documents to Florida law, and whether you can achieve tax savings by becoming a Florida resident.Craig R. Hersch is a Florida board certified wills, trusts & estates attorney and CPA who has three decades of experience helping families achieve their estate planning goals. He has developed a Unique Process(TM), The Family Estate & Legacy Program(TM), geared to provide clients with confidence and clarity through the often confusing legal, tax and financial world.

Insurance and Risk Management Strategies for Physicians and Advisors - David Edward Marcinko 2005

This book fulfills its promise as a peerless tool for physicians wanting to make good decisions about the risks they face.

Principles of Estate Planning, First Edition, Updated for 2013 (National Underwriter Academic Series) - Carolynn Tomin 2013-08-23

This new First Edition, Updated for 2013, includes all of the most current estate and gift tax amounts and exemptions resulting from the American Taxpayer Relief Act of 2012. Amounts are updated throughout the book in the examples, practitioner's pointers, client situations, end-of-chapter review questions and all learning content.

Florida Probate Rules and Rules of Judicial Administration - The Florida Bar Continuing Legal Education 2018-07-13

This latest edition of Florida Probate Rules and Rules of Judicial Administration, 2018 Edition is a handy go-to reference that every wills and estates practitioner should keep close at hand. It features the full text of the Florida Probate Rules and the Rules of Judicial Administration, including 3-year cycle amendments, with the committee notes, rule histories, and statutory and rule references for each rule. It also includes critical blackletter law from the Florida Statutes and Constitution, including Title XLII, Estates and Trusts, and Chapter 198, Estate Taxes in their entirety, as well as Homestead and exemptions, critical statutes on investment by fiduciaries and financial institutions, the most relevant statutes on developmental disabilities and social and economic assistance, expertly selected statutes from Title XL, Real and Personal Property, and various civil procedure statutes. Don't be without Florida Probate Rules and Judicial Administration, 2018 Edition , the convenient and critical reference you need every day for your wills and estates practice. Published by The Florida Bar and LexisNexis, it contains the high quality and expertise you have come to rely on and is fully up-to-date with the latest rules amendments and legislative changes.

Asset Protection in Florida - The Florida Bar Continuing Legal Education 2015-11-10

Asset Protection in Florida covers all facets of asset preservation for Florida residents. The Fourth Edition manual provides comprehensive analysis of the many steps available to protect assets from creditors' claims, both during your lifetime and at death. Among the many topics covered are homestead, trusts (both domestic and offshore), business planning, planning for dissolution of marriage, protection of retirement and education accounts, and the ethical aspects of advising clients on asset protection issues. Bankruptcy issues and tax planning are prominently featured throughout the text. The eBook versions of this title feature links to Lexis Advance for further legal research options.

The Legal Guide to NFA Firearms and Gun Trusts: Keeping Safe at the Range and in the Courtroom: The Definitive Guide to Forming and Operating a Gun Tr - Sean P. Healy 2016-12-05

The Definitive Guide to Forming and Operating a Gun Trust for Gun Owners and Their Advisors

Domestic Asset Protection Trusts - Richard W. Nenno

... discusses various aspects of the domestic asset protection trust (APT), including the reasons for and against recognizing such trusts, the benefits of such trusts, and the potential attributes of the Delaware, Alaska, Nevada, and South Dakota APT statues.

Plan Your Estate - Denis Clifford 2000

Covers everything from the basics about wills and living trusts to sophisticated tax-saving strategies for all estates, large and small.

Eight Steps to a Proper Florida Trust and Estate Plan - Alan S. Gassman 2015-12-16

Ettinger on Elder Law Estate Planning - Michael Ettinger 2010

"Elder Law Estate Planning" is a niche area of law which combines the features of elder law and estate planning that pertain most to the needs of the middle class. In 1991, AARP published a "Consumer Report on Probate" concluding that probate was a process to be avoided. That marked the end of traditional will planning and started the "living trust revolution." Since then, millions of people have set up trusts to: * Save time and money in settling the estate * Avoid legal guardianship if they become disabled * Avoid having their personal and financial matters made public * Reduce the chance of a "will contest" * Keep control in the family and out of the court system By 1990, the field of elder law also emerged to help people navigate the increased complexity of state Medicaid rules and regulations, the soaring costs of nursing home stays, and the fact that people were living considerably longer. Elder law and estate planning continue to grow independently of each other, sometimes to the detriment of clients. Estate planning lawyers are of little value when the estate plan to avoid probate fails to prevent a nursing home stay consuming all of the assets, because the lawyer is unfamiliar with elder law. On the other hand, elder law attorneys often protect assets but overlook basic estate planning issues such as saving taxes and keeping assets in the blood. The practice of Elder Law Estate Planning means: * Getting your assets to your heirs, in the best possible way, with least amount of taxes and legal fees * Keeping those assets in the blood for your grandchildren, and * Protecting your assets from the costs of long-term care and qualifying for government benefits available to pay for care. Middle class clients today need an "elder law estate planning attorney" to address their estate planning needs as well as to help with long-term care, disability and Medicaid issues as they arise.

Basic Estate Planning in Florida - 2020

Basic Estate Planning in Florida - The Florida Bar Continuing Legal Education 2014-12-10

Basic Estate Planning In Florida – 8th Edition Highlights Discussion of new laws, cases, and rules, including the effect of the American Taxpayer Relief Act of 2012 (ATRA) on: • various estate planning tools; and on • taxable rates; estate, gift, generation skipping, and income taxes; applicable exclusion amounts; and the portable deceased spousal unused exclusion (DSUE) amount for citizens and noncitizens; • general and limited powers of appointment, including "decanting", and releases and disclaimers of power; a spouse's election to take homestead as a tenant in common rather than through a life estate; and the treatment of insurance proceeds payable to a trust; • community property; the homestead exemption, and estate planning issues for same-sex couples; • compliance with Treasury Dept. Circular No. 230 for written tax advice; and • ethical issues, including the attorney's duty to third parties, asset protection planning, and gifts to lawyers and their relatives Revised forms and checklists

LexisNexis Practice Guide: Minnesota Estate Planning 2021 Edition - Phillip J. Ruce 2021-10-29

This book was created to assist Minnesota attorneys who are new to the estate planning practice area. It combines the planning concepts that are mandatory to any estate planning practice with practical tips, practice cautions, and intake and conveyance forms for use in client matters. This book will benefit attorneys who have not previously focused on the drafting of estate plans in Minnesota. From the initial client phone call to drafting effective distribution language and coordinating tax-qualified retirement accounts, this book walks the new estate planning practitioner through planning concepts and best practices for effective representation. The author is a respected and sought-after estate planning attorney who created a thriving law practice working exclusively with Minnesota families and their estate plans.

Your Living Trust and Estate Plan - Harvey J. Platt 2002

This revised fourth edition from estate-planning expert Harvey J. Plattdetails the most up-to-date strategies for using a living trust to create a?exible estate plan. With explanations of the latest tax laws, includingthe new Tax Relief Act, changes to the gift and generation skipping taxlaws, and the new uni?ed tax schedule rate. This book maps out themost effective techniques for saving money and property and providesthe essential details of successful estate planning. Your Living Trust and Estate Plan 2011-2012 covers vital subjects notfound in other books and discusses the components of and variationsin living trusts, how to select beneficiaries, understanding the probateprocess, contributing to charities, life insurance, retirement benefits,ethical wills, dynasty trusts, postmortem planning, trust decanting,income tax planning, and offshore trusts.

Wills, Trusts, and Estate Administration - Dennis R. Hower 2016-01-01

Succeed in your course and your paralegal career with WILLS, TRUSTS, AND ESTATE ADMINISTRATION, 8th Edition. This easy-to-understand text introduces the basics of estate planning and bequeathing property to others through wills and trusts, along with the laws and procedures involved, including the Uniform Probate Code. Packed with engaging, highly visual content enhanced by detailed exhibits and a writing style free of confusing legalese, the 8th Edition provides up-to-date coverage of relevant laws, court procedures, cases, tax implications, ethical considerations, and the roles paralegals and other professionals play in the process. Throughout the text, user-friendly case summaries, state-specific examples, practical assignments, detailed documents, and real-life contemporary issues prepare you for success as a paralegal in this important area of law. Important Notice: Media content referenced within the product description or the product text may not be available in the ebook version.

REITs - David M. Einhorn 2017-12-28

This book provides essential discussion of how the customs of corporate and real estate transactions differ and how conflicts involving letters of intent and contingencies to the deal can be resolved.

Inheritance Hijackers - Robert C. Adamski 2009

Inheritance theft is a widespread but hidden phenomenon afflicting every level of society. During the next twenty years, baby boomers and their children will inherit an estimated one hundred trillion dollars, much of which will be hijacked by family members, associates, or strangers. Everyone who might give or receive an inheritance is a potential victim.The legal and practical advice in this book teaches:"Who steals inheritances"Why, When, and How inheritances are stolen"Why we are all potential victims"How to protect yourselfThis book includes Q&As on inheritance law, quizzes to determine the security of your estate, and checklists on how to protect yourself.

Offshore Tax Strategies - Vernon K. Jacobs 2006-08

Offshore Tax Strategies by Vernon Jacobs and Richard Duke is a concise, plain English introduction to the U.S. tax rules for cross border investments, foreign trusts, foreign corportions and other foreign entities owned by U.S. citizens or residents. Jacobs is a CPA with a focus on international tax law and Duke is an attorney with a concentration in international tax law.

The White Coat Investor - James M. Dahle 2014-01

Written by a practicing emergency physician, The White Coat Investor is a high-yield manual that specifically deals with the financial issues facing medical students, residents, physicians, dentists, and similar high-income professionals. Doctors are highly-educated and extensively trained at making difficult diagnoses and performing life saving procedures. However, they receive little to no training in business, personal finance, investing, insurance, taxes, estate planning, and asset protection. This book fills in the gaps and will teach you to use your high income to escape from your student loans, provide for your family, build wealth, and stop getting ripped off by unscrupulous financial professionals. Straight talk and clear explanations allow the book to be easily digested by a novice to the subject matter yet the book also contains advanced concepts specific to physicians you won't find in other financial books. This book will teach you how to: Graduate from medical school with as little debt as possible Escape from student loans within two to five years of residency graduation Purchase the right types and amounts of insurance Decide when to buy a house and how much to spend on it Learn to invest in a sensible, low-cost and effective manner with or without the assistance of an advisor Avoid investments which are designed to be sold, not bought Select advisors who give great service and advice at a fair price Become a millionaire within five to ten years of residency graduation Use a "Backdoor Roth IRA" and "Stealth IRA" to boost your retirement funds and decrease your taxes Protect your hard-won assets from professional and personal lawsuits Avoid estate taxes, avoid probate, and ensure your children and your money go where you want when you die Minimize your tax burden, keeping more of your hard-earned money Decide between an employee job and an independent contractor job Choose between sole proprietorship, Limited Liability Company, S Corporation, and C Corporation Take a look at the first pages of the book by clicking on the Look Inside feature Praise For The White Coat Investor "Much of my financial planning practice is helping doctors to correct mistakes that reading this book would have avoided in the first place." - Allan S. Roth, MBA, CPA, CFP(R), Author of How a Second Grader Beats Wall Street "Jim Dahle has done a lot of thinking about the peculiar financial problems facing physicians, and you, lucky reader, are about to reap the bounty of both his experience and his research." - William J. Bernstein, MD, Author of The Investor's Manifesto and seven other investing books "This book should be in every career counselor's office and delivered with every medical degree." - Rick Van Ness, Author of Common Sense Investing "The White Coat Investor provides an expert consult for your finances. I now feel confident I can be a millionaire at 40 without feeling like a jerk." - Joe Jones, DO "Jim Dahle has done for physician financial illiteracy what penicillin did for neurosyphilis." - Dennis Bethel, MD "An excellent practical personal finance guide for physicians in training and in practice from a non biased source we can actually trust." - Greg E Wilde, M.D Scroll up, click the buy button, and get started today!

Wealthcounsel(r) Estate Planning Strategies - Randy Gardner 2009

Florida Motions in Limine - Heidi F. Friedman 2008

Legal Mumbo Jumbo - Steven J. Gibbs 2016-10-18

If you've ever dealt with a legal issue, you've probably wished you had someone to turn to for information prior to thinking about paying legal fees or deciding who to hire. Ideally, this would be someone with inside experience who could walk you through the basics and offer a roadmap for your area of legal concern. In this way, you would be empowered to make confident decisions and thereafter manage the process with your legal advisor. After all, just a little bit of insight can make all the difference between feeling empowered to address your legal challenges or being left overwhelmed. Steven J. Gibbs is a compassionate attorney whose singular purpose is to provide a helpful resource for individuals, families and businesses who either regularly deal with certain areas of legal exposure or are undergoing common legal problems. This book offers legal insight into 8 common areas of law gleaned from Steven's many years of law practice. This text is not a complicated legal treatise, but rather is offered to consumers in an easy to understand format, including a comprehensive overview of each subject, background information, examples, explanations of terms and suggestions. As a bonus, Steven has included a section at the end of the book to assist you in hiring an attorney who is caring, experienced and the best fit for your legal matters. After all, the attorney client relationship is intended to be one that is for the long term and backed by trust and integrity. Steven's hope is that you will be empowered to take charge of your legal concerns, so as to become a proactive participant with your legal counsel rather than an helpless bystander. Are you ready for the road map to navigate your maze of Legal Mumbo Jumbo? Get proactive with your legal concerns today!